



Focused eHealth Innovations

Web Infrastructure for Treatment Services (WITS)

**WITS Module Documentation for:
Linked Consents**

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A. Overview

Purpose

Linked Consent features were developed in order to allow better management of client records across Agencies, and to be able to integrate consented records into client records rather than having them accessible only through the Client Search screen. These features will allow users to manually create a link between two client records in order to indicate that they are the same person, and will also allow for the “filing” of consented activities into the client record.

New Features

- Addition of a “Linked Consents” module at the Client List menu pane
- Improved relevance of the Clients with Consents from Outside Agencies list
- Connection between client records in two different agencies
- Linked Consent permissions tied to the Clinical Supervisor Role

Roles Impacted

Clinical Supervisor

Responsibilities:

1. Be able to confirm that two different client records do or do not refer to the same individual
2. Link or unlink those client records

WITS Administrator

Responsibilities:

1. This role has the same access as the Clinical Supervisor role for the purposes of this feature.

B. Process Workflow – New Client

This follows the impact to the Consent & Referral processes, for Agencies A and B. In this first scenario, the Client Daisy Duck does not already exist in Agency B.

Figure 1: New Client Profile in Agency A

- The Client record exists in Agency A.

Figure 2: Consent from Agency A to Agency B

- A Consent is created from Agency A to Agency B.

Figure 3: Referral from Agency A to Agency B

Client Referral for Duck, Daisy

Referred By

Agency: Community Connections
 Facility: Admin Facility
 Staff Member: Moore, Sarah, QN
 Program:
 Reason: Service not available at this facility
 If Other:
 Is Consent Verification Required? Yes
 Is Consent Verified? Yes
 Continue This Episode of Care? No

Referred To

Signed Consents: FEI Provider Agency
 Agency: FEI Provider Agency
 Facility: Backstreet
 Staff Member:
 Program: Growth Horizons
 Non-System Agency:
 Non-System Modality:
 Non-System Specifier:
 Appt Date: Undetermined

Consents Granted

Consent Date: 4/3/2011
 Disclosure Domains:
 Admission (UD, +10)
 DENS ASI Lite (UD, +10)
 DENS ASI Assessment (UD, +10)
 Behavioral Health Assessment (UD, +10)
 Client Information (Profile) (UD, +10)

Comments

Referral Status: Referral Created/Pending
 Referral Date: 4/4/2011
 Projected End Date:
 Created Date: 4/4/2011 11:18 AM

Buttons: Cancel, Save, Finish

- A Referral is created from Agency A to Agency B.

Figure 4: Agency B Client List, Prior to Accepting Referral

Client Search

Agency: FEI Provider Agency
 First Name: Daisy
 Last Name:
 SSN:
 Client ID:
 Treatment Staff:
 Case Status: All Clients
 Other Number:
 Include Only Active Consents: Yes

Client List (Export)

Client ID	Full Name	DOB	SSN	Gender	Actions

Clients with Consents from Outside Agencies

Agency	Client ID	Client Name	DOB	SSN	Gender	Actions
Community Connections	F119069UD588100	Duck, Daisy	1/1/1980	156-94-8659	Female	Activity List Link Remove

- In Agency B, a search for Daisy Duck shows that she has consented information, but does not already exist in Agency B. For the purposes of this scenario, we are assuming that she does not exist in Agency B under another name, either.
- Note that if you have the Clinical Supervisor or the WITS Administrator role, you will see the "Link" option in the Actions column.

Figure 5: Agency B Consented Activity List

[Home Page](#)
[Emergency Services](#)
[Agency](#) ▶
[Group List](#) ▶
[Client List](#) ▼
 [Client Profile](#) ▶
 [Linked Consents](#)
 [Emergency Services](#)
 [Non-Episode Contact](#)
 [Activity List](#) ▼
 [Episode List](#)
[System Administration](#) ▶
[My Settings](#) ▶

Consented Activity List from Community Connections for Duck, Daisy

PROHIBITION ON REDISCLOSURE OF INFORMATION CONCERNING CLIENT IN ALCOHOL OR DRUG ABUSE TREATMENT

This notice accompanies a disclosure of information concerning a client in alcohol/drug abuse treatment, made to you with the consent of such client. This information has been disclosed to you from records protected by Federal confidentiality rules (42 CFR Part 2). The Federal rules prohibit you from making any further disclosure of this information unless further disclosure is expressly permitted by the written consent of the person to whom it pertains or as otherwise permitted by 42 CFR Part 2. A general authorization for the release of medical or other information is NOT sufficient for this purpose. The Federal rules restrict any use of the information to criminally investigate or prosecute any alcohol or drug abuse patient.

Activity	Case #	Activity Date	Created Date	Status	Actions
Client Information (Profile)	1	4/4/2011	4/4/2011	In Progress	Review
Intake Transaction	1	4/4/2011	4/4/2011	In Progress	Review

- If you select the “Activity List” Action link, you will be able to see the information that Agency A has shared with Agency B.

Figure 6: Accepting Referral from Agency A to Agency B

[Home Page](#)
[Emergency Services](#)
[Agency](#) ▼
 [Agency List](#) ▼
 [Agency Profile](#) ▶
 [Aliases](#)
 [Contacts](#)
 [Governance](#) ▶
 [Relationships](#) ▶
 [Announcements](#)
 [Referrals](#) ▼
 [Referrals In](#) ▼
 [Referrals Out](#)
 [Removed Consents](#)
 [Wait List](#)
 [Facility List](#) ▶
 [Staff List](#) ▶
 [Tx Team Groups](#) ▶
 [Non-Staff Physicians](#) ▶
 [System Usage](#)
 [Billing](#) ▶
 [Contract Management](#) ▶
[Group List](#) ▶
[Client List](#) ▶
[System Administration](#) ▶
[My Settings](#) ▶
[Reports](#)
[Support Ticket](#)

Client Referral for Duck, Daisy

Referred By
 Agency
 Facility
 Staff Member
 Program
 State Reporting
 Category
 Reason
 If Other

Is Consent Verification Required? ☒ Yes
 Is Consent Verified? ☒ Yes
 Continue This Episode of Care? ☐ No

Referred To
 Signed Consents
 Agency
 Facility
 Staff Member
 Program
 State Reporting
 Category
 Non-System Agency
 Non-System Modality
 Non-System Specifier
 Appt Date Undetermined

Consents Granted
 Consent Date: 4/3/2011
 Disclosure Domains:
 Admission (UD, +10)
 DENS ASI Lite (UD, +10)
 DENS ASI Assessment (UD, +10)
 Behavioral Health Assessment (UD, +10)
 Client Information (Profile) (UD, +10)

Comments
 Referral Status Placed/Accepted
 Projected End Date
 Created Date

Cancel Finish

- Agency B accepts the Referral from Agency A.

Figure 7: New Client Profile in Agency B

Client Profile for Duck, Daisy

First Name: Middle Name: Last Name: Maiden Name:

Gender: DOB: SSN:

Provider Client ID: AKAIMS Client ID:

Record Created By: Last Updated By:

Created Date: Last Updated Date:

Driver's License: Medicaid #:

Has paper file:

[Cancel](#) [Save](#) [Finish](#)

Alternate Names			
Last Name	First Name	Middle Name	Actions

Addresses					
Address Type	Address	Confidential	Created	Updated	Actions

- Accepting the Referral creates the new Client Profile in Agency B, since the client did not yet exist in Agency B.

Figure 8: Client List in Agency B, After Accepting Referral

Client Search

Agency: Facility:

First Name: Last Name:

SSN: DOB:

Client ID: Provider Client ID:

Treatment Staff: Primary Care Staff:

Case Status: Intake Staff:

Other Number: Number Type:

Include Only Active Consents:

[Clear](#) [Go](#)

Client List (Export)						Add Client
Client ID	Full Name	DOB	SSN	Gender	Actions	
F119069UD588100	Duck, Daisy	1/1/1980	156-94-8659	Female	Profile Activity List Linked Consents	

Clients with Consents from Outside Agencies						
Agency	Client ID	Client Name	DOB	SSN	Gender	Actions

- Daisy Duck's consented information from Agency A no longer appears on the Clients with Consents from Outside Agencies list.
- Note instead the Action link for "Linked Consents" on the Client List listing for Daisy Duck.

Figure 9: Linked Consents in Agency B

- Selecting the “Linked Consents” Action link on the Client List will bring you to the Linked Consents screen.
- If there were multiple Consents for Daisy Duck from different Agencies, you would be able to filter the list based on Agency.
- Note the “Add Link” feature in the Linked Consent List header. This only appears for the Clinical Supervisor and the WITS Administrator.
- To view the Consented Activities, select the “Activity List” Action link.

Figure 10: Consented Activity List from Agency A, in Agency B

- Daisy Duck’s Consented Activities from Agency A have been effectively removed from the Clients with Consents from Outside Agencies list, to become available instead through the Linked Consents menu item under her Client Profile.

C. Process Workflow – Existing Client

This follows the impact to the Consent & Referral processes, for Agencies B and C. In this second scenario, the client Daisy Duck already exists in both Agency B and Agency C.

Figure 11: Consent from Agency C to Agency B

Client Disclosure Agreement [Create Referral Using this Disclosure Agreement](#)

Note: Consented information may not be redisclosed.

Client Name: Duck, Daisy
Client ID: F119069UD588100
Disclosed From Agency: Sound Alternatives

Entities with Disclosure Agreements: All Other Agencies
Disclosed To Agency: FEI Provider Agency
Disclosed To Entity (Non System Agency):
Purpose for disclosure: Testing Consent

Consent Date: 4/3/2011
Has the client signed the paper agreement form: Yes

Client Information Options
Alaska Screening Tool (AST FY2)
Alaska Screening Tool (AST)
Client Status Review (CSR FY20)
Client Status Review (CSR)
DENS ASI Assessment
Discharge
Drug Test Results
ECourt Admission
ECourt Alcohol Drug Assessment
ECourt Cage Assessment
ECourt Case Management

Consent Expires Upon
☐ Discharge(UD) +Days
☐ Date Signed(DS) +Days
☐ Other Event(OE) Exp
☐ Crim Just Cond (CJC) Exp

Disclosure Selection
Admission (UD, +10)
Behavioral Health Assessment (UD, +10)
Client Information (Profile) (UD, +10)
DENS ASI Lite (UD, +10)
Intake Transaction (UD, +10)
Treatment Plan (UD, +10)
Treatment review (UD, +10)

Comments: Other Disclosures:

Finish **Revoke**

- Agency C creates a Consent to Agency B for Daisy Duck.

Figure 12: Referral from Agency C to Agency B

Client Referral for Duck, Daisy

Referred By
Agency: Sound Alternatives
Facility: Sound Alternatives
Staff Member: Moore, Sarah, QN
Program:
Reason: Client declined
If Other:
Is Consent Verification Required? Yes
Is Consent Verified? Yes
Continue This Episode of Care? No

Referred To
Signed Consents: FEI Provider Agency
Agency: FEI Provider Agency
Facility: Test
Staff Member:
Program: AAA
Non-System Agency:
Non-System Modality:
Non-System Specifier:
Appt Date: Undetermined

Consents Granted
Consent Date: 4/3/2011
Disclosure Domains:
Admission (UD, +10)
DENS ASI Lite (UD, +10)
Behavioral Health Assessment (UD, +10)
Client Information (Profile) (UD, +10)
Intake Transaction (UD, +10)

Comments:

Referral Status: Referral Created/Pending
Referral Date: 4/4/2011
Projected End Date:
Created Date: 4/4/2011 12:56 PM

Cancel **Save** **Finish**

- Agency C creates a Referral to Agency B for Daisy Duck.

Figure 13: Referral Pending in Agency B

Home Page
Emergency Services
Agency ▾
Agency List ▾
Agency Profile ▶
Aliases
Contacts
Governance ▶
Relationships ▶
Announcements
Referrals ▾
Referrals In ▾
Referrals Out
Removed Consents
Wait List
Facility List ▶
Staff List ▶
Tx Team Groups ▶

Referrals for Test [\(Export\)](#)

Referral Status Codes
Placed/Accepted
Referred Terminated
Refused Treatment
Rejected by Program

Search Criteria
Referral Created/Pending

Client Id Created Date Referred Date

First Name Last Name

[Clear](#) [Go](#)

Actions	Client ID	Client Name	DOB	Created Date	Referring Agency/Facility	Referred To Modality	Referral Status	Ref to Facility	Referral Comments
Review	F119069UD588100	Duck, Daisy	1/1/1980	4/4/2011	Sound Alternatives/Sound Alternatives	Acupuncture	Referral Created/Pending	Test	

- The Referral in Agency B has not yet been accepted.

Figure 14: Client List in Agency B, Prior to Accepting Referral from Agency C

Home Page
Emergency Services
Agency ▶
Group List ▶
Client List ▾
Client Profile ▶
Linked Consents
Emergency Services
Non-Episode Contact
Activity List ▶
Episode List
System Administration ▶
My Settings ▶
Reports
Support Ticket

The filter you created has been applied to the client list.

Client Search

Agency Facility

First Name Last Name

SSN DOB

Client ID Provider Client ID

Treatment Staff Primary Care Staff

Case Status Intake Staff

Other Number Number Type

Include Only Active Consents

[Clear](#) [Go](#)

Client List [\(Export\)](#) [Add Client](#)

Client ID	Full Name	DOB	SSN	Gender	Actions
F119069UD588100	Duck, Daisy	1/1/1980	156-94-8659	Female	Profile Activity List Linked Consents

Clients with Consents from Outside Agencies

Agency	Client ID	Client Name	DOB	SSN	Gender	Actions
Sound Alternatives	F119069UD588100	Duck, Daisy	1/1/1980	156-94-8659	Female	Activity List Link Remove

- Daisy Duck appears on the Client List because she already existed in Agency B.
- Daisy also exists on the Clients with Consents from Outside Agencies, because a new Consent for Daisy Duck has been granted to Agency B.

Figure 15: Referral from Agency C is Accepted in Agency B

Home Page
Emergency Services
Agency ▾
Agency List ▾
Agency Profile ▶
Aliases
Contacts
Governance ▶
Relationships ▶
Announcements
Referrals ▾
Referrals In ▾
Referrals Out
Removed Consents
Wait List
Facility List ▶
Staff List ▶
Tx Team Groups ▶

Referrals for Test (Export)

Referral Status Codes
 Referral Created/Pending
 Referred Terminated
 Refused Treatment
 Rejected by Program

Search Criteria
 Placed/Accepted

Client Id Created Date Referred Date

First Name Last Name

Actions	Client ID	Client Name	DOB	Created Date	Referring Agency/Facility	Referred To Modality	Referral Status	Ref to Facility	Referral Comments
Review	F119069UD588100	Duck, Daisy	1/1/1980	4/4/2011	Sound Alternatives/Sound Alternatives	Acupuncture	Placed/Accepted	Test	

- Agency B accepts the Referral from Agency C.

Figure 16: Client List in Agency B, After Accepting Referral from Agency C

Home Page
Emergency Services
Agency ▶
Group List ▶
Client List ▾
Client Profile ▶
Linked Consents
Emergency Services
Non-Episode Contact
Activity List ▶
Episode List
System Administration ▶
My Settings ▶
Reports
Support Ticket

Client Search

Agency Facility

First Name Last Name

SSN DOB

Client ID Provider Client ID

Treatment Staff Primary Care Staff

Case Status Intake Staff

Other Number Number Type

Include Only Active Consents

Client List (Export) [Add Client](#)

Client ID	Full Name	DOB	SSN	Gender	Actions
F119069UD588100	Duck, Daisy	1/1/1980	156-94-8659	Female	Profile Activity List Linked Consents

Clients with Consents from Outside Agencies

Agency	Client ID	Client Name	DOB	SSN	Gender	Actions

- After accepting the Referral from Agency C, Daisy Duck no longer appears on the Clients with Consents from Outside Agencies.

Figure 17: Linked Consent List, After Accepting Referral from Agency C

Home Page
Emergency Services
Agency ▶
Group List ▶
Client List ▾
Client Profile ▶
Linked Consents
Emergency Services
Non-Episode Contact
Activity List ▶
Episode List
System Administration ▶

Linked Client Consents in Other Agencies

Consenting Agency

Linked Consent List [Add Link](#)

Agency	Client Name	Client ID	DOB	SSN	Min Act. Date	Max Act. Date	Actions
Community Connections	Duck, Daisy	F119069UD588100	1/1/1980	156-94-8659	4/4/2011	4/4/2011	Activity List
Sound Alternatives	Duck, Daisy	F119069UD588100	1/1/1980	156-94-8659	4/4/2011	4/4/2011	Activity List

- In Agency B, you can now see both Consents on the Linked Consents List, one from Agency A and one from Agency C.

D. Process Workflow - Linked Client

This follows the impact to the Client records and the Consent & Referral processes for Agencies B and D when Client records are linked. In this third scenario, the client Daisy Duck already exists in Agency B, and exists under another Client ID in Agency D.

Figure 18: Client Profile in Agency D

Client Profile for Duke, Daisy

First Name: **Daisy** Provider Client ID:
 Middle Name: AKA/MS Client ID: **F119047UD398100**
 Last Name: **Duke** Record Created By: **Moore, Sarah, QN**
 Maiden Name: **Duke** Last Updated By: **Moore, Sarah, QN**
 Gender: **Female** Created Date: **4/4/2011 2:28 PM**
 DOB: **1/1/1980** Last Updated Date: **4/4/2011 2:28 PM**
 SSN: **456-83-9437**
 Driver's License:
 Medicaid #:
 Has paper file: **Yes**

Alternate Names

Last Name	First Name	Middle Name	Actions

Addresses

Address Type	Address	Confidential	Created	Updated	Actions

- In this Client Profile, you can see that Daisy Duke has a different last name and a different Social Security Number than the Daisy Duck in Agencies A, B, or C.

Figure 19: Consent from Agency D to Agency B

Client Disclosure Agreement [Create Referral Using this Disclosure Agreement](#)

Note: Consented information may not be redisclosed.
 Client Name: **Duke, Daisy**
 Client ID: **F119047UD398100**
 Disclosed From Agency: **Narcotic Drug Treatment Center Inc.**

Entities with Disclosure Agreements: **All Other Agencies**
 Disclosed To Agency: **FEI Provider Agency**
 Disclosed To Entity (Non System Agency):
 Purpose for disclosure: **Testing Consent**
 Consent Date: **4/3/2011**
 Has the client signed the paper agreement form: **Yes**

Client Information Options

Client Information Options	Consent Expires Upon	Disclosure Selection
Alaska Screening Tool (AST FY2011)	<input type="checkbox"/> Discharge(UD) +Days	Admission (UD, +10)
Alaska Screening Tool (AST)	<input type="checkbox"/> Date Signed(DS) +Days	Client Information (Profile) (UD, +10)
Behavioral Health Assessment	<input type="checkbox"/> Other Event(OE) Exp	DENS ASI Lite (UD, +10)
Client Status Review (CSR FY2011)	<input type="checkbox"/> Crim Just Cond (CJC) Exp	Discharge (UD, +10)
DENS ASI Assessment		Intake Transaction (UD, +10)
Drug Test Results		Miscellaneous Note Detail (UD, +10)
ECourt Admission		Treatment Plan (UD, +10)
ECourt Alcohol/Drug Assessment		Treatment review (UD, +10)
ECourt Case Assessment		
ECourt Case Management		

Comments: Other Disclosures:

Finish **Revoke**

- Agency D creates a Consent record to Agency B for Daisy Duke.

Figure 20: Referral from Agency D to Agency B

Client Referral for Duke, Daisy

Referred By

Agency: Narcotic Drug Treatment Center Inc.
 Facility: Center for Drug Problems
 Staff Member: Moore, Sarah, QN
 Program:
 Reason: Client declined
 If Other:
 Is Consent Verification Required? Yes
 Is Consent Verified? Yes
 Continue This Episode of Care? No

Referred To

Signed Consents: FEI Provider Agency
 Agency: FEI Provider Agency
 Facility: Backstreet
 Staff Member:
 Program: Growth Horizons
 Non-System Agency:
 Non-System Modality:
 Non-System Specifier:
 Appt Date: Undetermined

Consents Granted

Consent Date: 4/3/2011
 Disclosure Domains:
 Admission (UD, +10)
 DENS ASI Lite (UD, +10)
 Client Information (Profile) (UD, +10)
 Discharge (UD, +10)
 Intake Transaction (UD, +10)

Comments

Referral Status: Referral Created/Pending
 Referral Date: 4/4/2011
 Projected End Date:
 Created Date: 4/4/2011 2:36 PM

Buttons: Cancel, Save, Finish

- Agency D creates a Referral to Agency B for Daisy Duke.

Figure 21: Client List in Agency B, Prior to Accepting Referral from Agency D

Client Search

Agency: FEI Provider Agency
 First Name: Daisy
 Last Name:
 SSN:
 Client ID:
 Treatment Staff:
 Case Status: All Clients
 Other Number:
 Include Only Active Consents: Yes

Client List (Export)

Client ID	Full Name	DOB	SSN	Gender	Actions
F119069UD588100	Duck, Daisy	1/1/1980	156-94-8659	Female	Profile Activity List Linked Consents

Clients with Consents from Outside Agencies

Agency	Client ID	Client Name	DOB	SSN	Gender	Actions
Narcotic Drug Treatment Center Inc.	F119047UD398100	Duke, Daisy	1/1/1980	456-83-9437	Female	Activity List Link Remove

- In Agency B, before they accept the Referral from Agency D, they can see that a Client named Daisy Duke has been consented to them.
- Daisy Duke and Daisy Duck have different last names and different Client IDs.
- The Clinical Supervisor knows that Daisy Duke is the same person as Daisy Duck, and wants to link the records.
- The Clinical Supervisor selects the “Link” option under the Actions column.

Figure 22: Link to Consented Client Screen in Agency B

Client ID	Full Name	DOB	SSN	Gender	Actions

- Selecting the “Link” option brings you to the Link to Consented Client screen, where you can search for the Client to link to.

Figure 23: Client Records to Link in Agency B

Client ID	Full Name	DOB	SSN	Gender	Actions
F119069UD588100	Duck, Daisy	1/1/1980	156-94-8659	Female	Link

- A search for “Daisy” brings up Daisy Duck’s record. To link to this record, select the “Link” option in the Actions column.

Figure 24: Confirmation of Consent Linkage in Agency B

Are you sure you want to link current consented client Duke, Daisy's consent to client Duck, Daisy?

[Yes](#) [No](#)

- You will be asked to confirm the linkage between Daisy Duke and Daisy Duck.

Figure 25: Linked Consent List in Agency B, After Linking Consents

User: Moore, Sarah, QN
Loc: FEI Provider Agency, Backstreet
Client: Duck, Daisy | F119069UD588100

March 2011 Dev

Home Page
Emergency Services
Agency
Group List
Client List
Client Profile
Linked Consents
Emergency Services
Non-Episode Contact
Activity List
Episode List
System Administration

Linked Client Consents in Other Agencies

Consenting Agency:

Clear Cancel Go

Linked Consent List [Add Link](#)

Agency	Client Name	Client ID	DOB	SSN	Min Act. Date	Max Act. Date	Actions
Community Connections	Duck, Daisy	F119069UD588100	1/1/1980	156-94-8659	4/4/2011	4/4/2011	Consented Activity List
Sound Alternatives	Duck, Daisy	F119069UD588100	1/1/1980	156-94-8659	4/4/2011	4/4/2011	Consented Activity List
Narcotic Drug Treatment Center Inc.	Duke, Daisy	F119047UD398100	1/1/1980	456-83-9437	4/4/2011	4/4/2011	Consented Activity List Unlink

- Now all three Consents appear on the Linked Consent List for Daisy Duck.
- Note that the Consent that was manually linked has an Action item for “Unlink”. This only appears if you have the Clinical Supervisor role or the WITS Administrator role, and only for records that were manually linked.

Figure 26: Accepting Referral from Agency D, in Agency B

User: Moore, Sarah, QN
Loc: FEI Provider Agency, Backstreet
Client: Duck, Daisy | F119069UD588100

March 2011 Dev

Home Page
Emergency Services
Agency
Agency List
Agency Profile
Aliases
Contacts
Governance
Relationships
Announcements
Referrals
Referrals In
Referrals Out
Removed Consents
Wait List
Facility List
Staff List
Tx Team Groups

Referrals for Backstreet [Export](#)

Referral Status Codes **Search Criteria**

Placed/Accepted
Referred Terminated
Refused Treatment
Rejected by Program

Referral Created/Pending

Client ID: Created Date: Referred Date:

First Name: Last Name:

Clear Go

Actions	Client ID	Client Name	DOB	Created Date	Referring Agency/Facility	Referred To Modality	Referral Status	Ref to Facility	Referral Comments
Review	F119047UD398100	Duke, Daisy	1/1/1980	4/4/2011	Narcotic Drug Treatment Center Inc./Center for Drug Problems	Inpatient Detoxification	Referral Created/Pending	Backstreet	

- If the two records are already linked when you accept the Referral from Agency D, accepting the referral will not create a new Client record for Daisy Duke.

Figure 27: Existing Client Record in Agency B

[Home Page](#)
[Emergency Services](#)
[Agency](#)
[Group List](#)
[Client List](#)
[Client Profile](#)
[Alternate Names](#)
[Additional Information](#)
[Contact Info](#)
[Collateral Contacts](#)
[Other Numbers](#)
[History](#)
[Client Group Enrollment](#)
[Authorization](#)
[Allergies](#)
[Linked Consents](#)
[Emergency Services](#)
[Non-Episode Contact](#)
[Activity List](#)
[Episode List](#)
[System Administration](#)
[My Settings](#)
[Reports](#)
[Support Ticket](#)

Client Profile for Duck, Daisy

First Name: **Daisy**

Middle Name:

Last Name: **Duck**

Maiden Name: **Duke**

Gender: **Female**

DOB: **1/1/1980**

SSN: **156-94-8659**

Driver's License:

Medicaid #:

Has paper file: **Yes**

Provider Client ID:

AKA/MS Client ID: **F119069UD588100**

Record Created By: **Moore, Sarah, QN**

Last Updated By: **Moore, Sarah, QN**

Created Date: **4/4/2011 12:28 PM**

Last Updated Date: **4/4/2011 12:28 PM**

[Cancel](#)
[Save](#)
[Finish](#)

Alternate Names

Last Name	First Name	Middle Name	Actions

Addresses

Address Type	Address	Confidential	Created	Updated	Actions

- Accepting the Referral from Agency D for Daisy Duke will bring you to Daisy Duck's Client Profile, because you indicated that they are the same person.

E. Process Workflow – Unlinking a Client

This follows the impact to the Client records and the Consent & Referral processes for Agency B when two Client records are unlinked.

Figure 28: Client Search in Agency B

Client Search

Agency: FEI Provider Agency

Facility:

First Name: Daisy

Last Name:

SSN:

DOB:

Client ID:

Provider Client ID:

Treatment Staff:

Primary Care Staff:

Case Status: All Clients

Intake Staff:

Other Number:

Number Type:

Include Only Active Consents: Yes

[Clear](#) [Go](#)

Client List (Export) [Add Client](#)

Client ID	Full Name	DOB	SSN	Gender	Actions
F119069UD588100	Duck, Daisy	1/1/1980	156-94-8659	Female	Profile Activity List Linked Consents

Clients with Consents from Outside Agencies

Agency	Client ID	Client Name	DOB	SSN	Gender	Actions

- When the Consents are Linked, the Consented Client does not show up on the Clients with Consents from Outside Agencies list.

Figure 29: Linked Consent List Prior to Unlinking Consent

Linked Client Consents in Other Agencies

Consenting Agency:

[Clear](#) [Cancel](#) [Go](#)

Linked Consent List [Add Link](#)

Agency	Client Name	Client ID	DOB	SSN	Min Act. Date	Max Act. Date	Actions
Community Connections	Duck, Daisy	F119069UD588100	1/1/1980	156-94-8659	4/4/2011	4/4/2011	Consented Activity List
Sound Alternatives	Duck, Daisy	F119069UD588100	1/1/1980	156-94-8659	4/4/2011	4/4/2011	Consented Activity List
Narcotic Drug Treatment Center Inc.	Duke, Daisy	F119047UD398100	1/1/1980	456-83-9437	4/4/2011	4/4/2011	Consented Activity List Unlink

- The Linked Consent List shows the Consented Client.
- If you have the Clinical Supervisor role or the WITS Administrator role, you can select the “Unlink” option from the Actions column.

Figure 30: Removing a Linked Consent Confirmation Message

Are you sure you want to remove this linked consent from the current client?

[Yes](#) [No](#)

- Selecting “Unlink” will prompt this warning message.

Figure 31: Linked Consent List After Unlinking Consent

- If you confirm that you want to Unlink the Consent, you will see that the Consented Daisy Duke is no longer appearing on the list under Daisy Duck's Profile.

Figure 32: Client List Screen After Unlinking Consent

- On the Client List screen, Daisy Duke now appears on the Clients with Consents from Outside Agencies list again.

Figure 33: Referrals In Screen After Unlinking Consent

- The Referral List indicates that the Referral was Placed/Accepted, but there is no associated Client Profile or Intake for Daisy Duke since the Consents were unlinked.

F.Any Intakes or additional clinical records created for this Client will remain under the Client record this Consent was linked to when they were created.